

Turnover for Broadcasting in Japan

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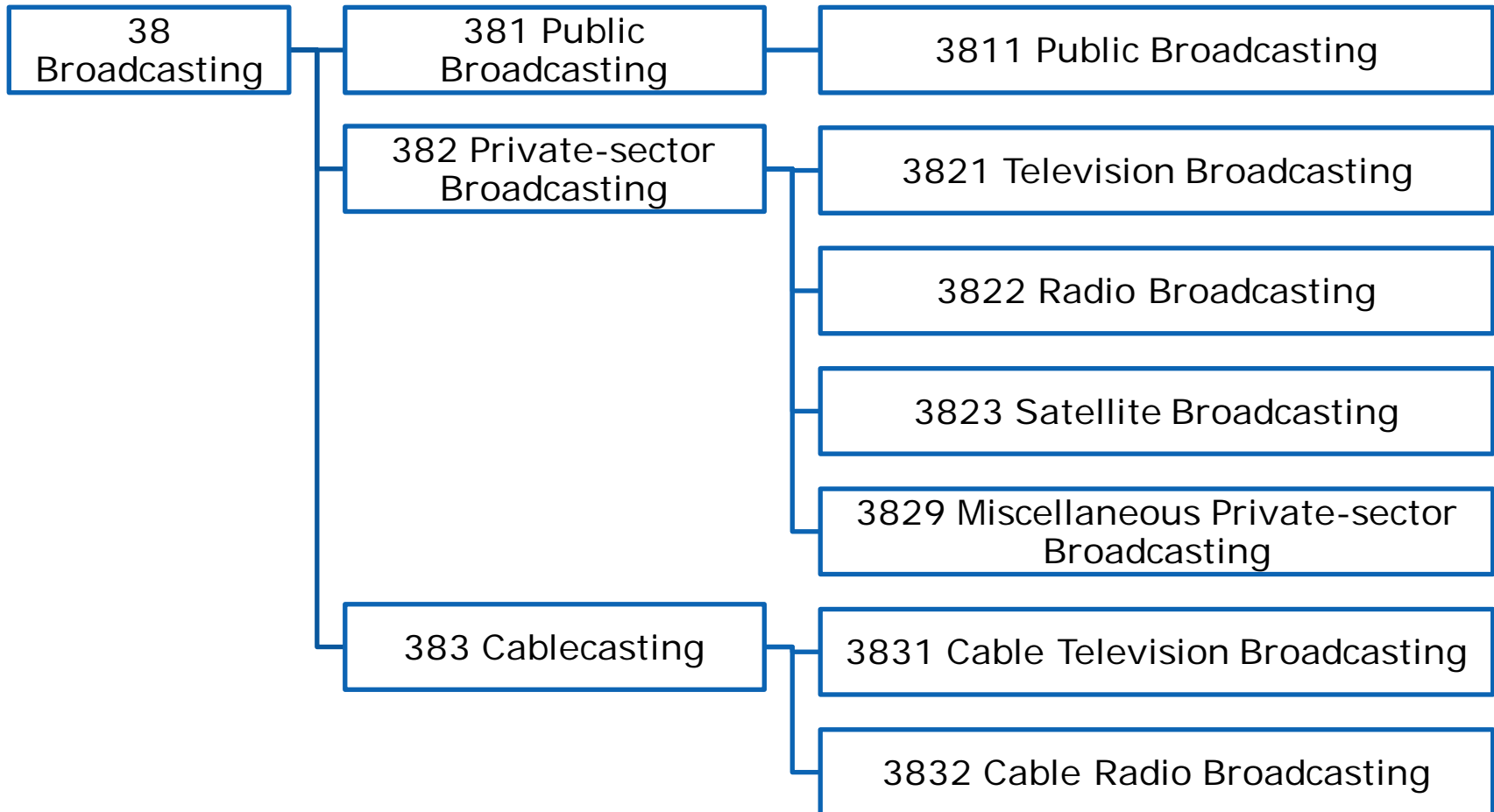
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1. Standard classification structure

Japan Standard Industrial Classification (JSIC)



2. Surveys of turnover

Monthly

- Monthly Survey on Service Industries (MSSI)

Annual

- Basic Survey on the Information and Communications Industry

Periodic

- Economic Census for Business Activity (ECBA) (every 5 years)

3. Unit of measurement to be collected

MSSI

- 381-Enterprise
- 382, 383-Enterprise & Establishment

Basic Survey on the Information and Communications Industry

- Enterprise

ECBA

- Enterprise & Establishment



4. Market conditions and constraints

□ Turnover

381 Public Broadcasting (NHK Only)

- Receiving Fee (advertising not allowed)

382 Private-sector Broadcasting

- Advertising Income
- Fee-paying Broadcast Income

383 Cablecasting

- Advertising Income
- Fee-paying Broadcast Income

4. Market conditions and constraints (Cont.)

□ Enterprises and Establishments (1st Feb. 2012)

JSIC Group	Enterprises	Establishments
38 Broadcasting	881	1808
381 Public Broadcasting	1	79
382 Private-sector Broadcasting	509	789
383 Cablecasting	371	934

□ Turnover (2011)

- “JSIC38 Broadcasting” accounts for 0.30% turnover of all industries.

(Source: 2012 ECBA by SBJ, METI)

4. Market conditions and constraints (Cont.)

□ Turnover and Workers

	Turnover (trillion yen)		Workers (thousand)
	38 Broadcasting	382 Private-sector Broadcasting (percentage of "382" in "38")	38 Broadcasting
	2009	3.91	2.50 (63.9%)
2010	4.03	2.56 (63.4%)	79
2011	3.65	2.21 (60.5%)	79
2012	3.56	2.20 (61.9%)	77

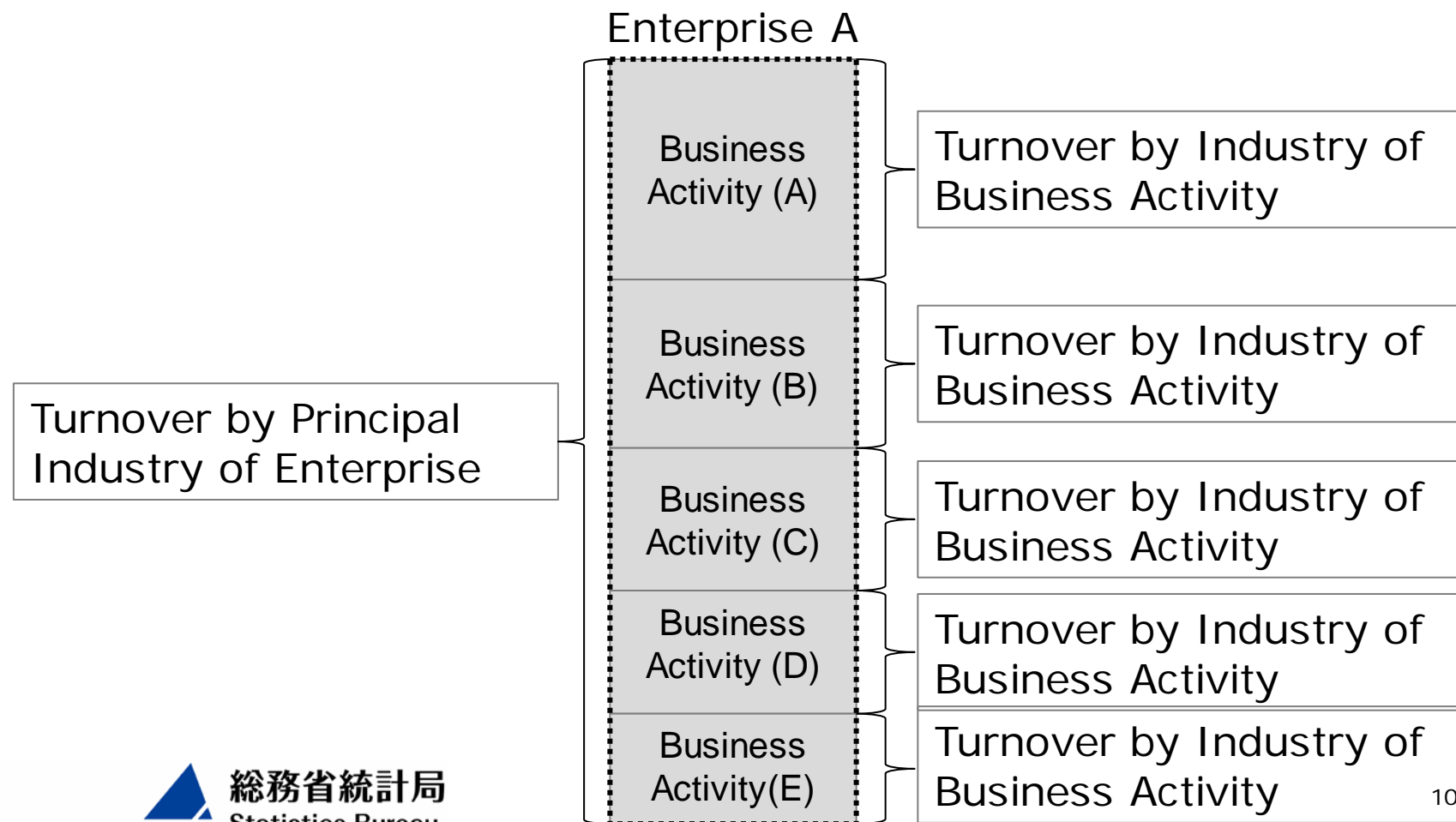
(Source: MSSSI by SBJ)

4. Market conditions and constraints (Cont.)

- Revision of MSSSI (January, 2013)
 - Collect turnover by business activity in addition to turnover by principal industry of entity
 - Turnover by principal industry of entity: collect total amount of turnover as turnover of principal industry of entity concerned
 - Turnover by business activity: collect turnover breakdowns of top 4 business activities of enterprise

4. Market conditions and constraints (Cont.)

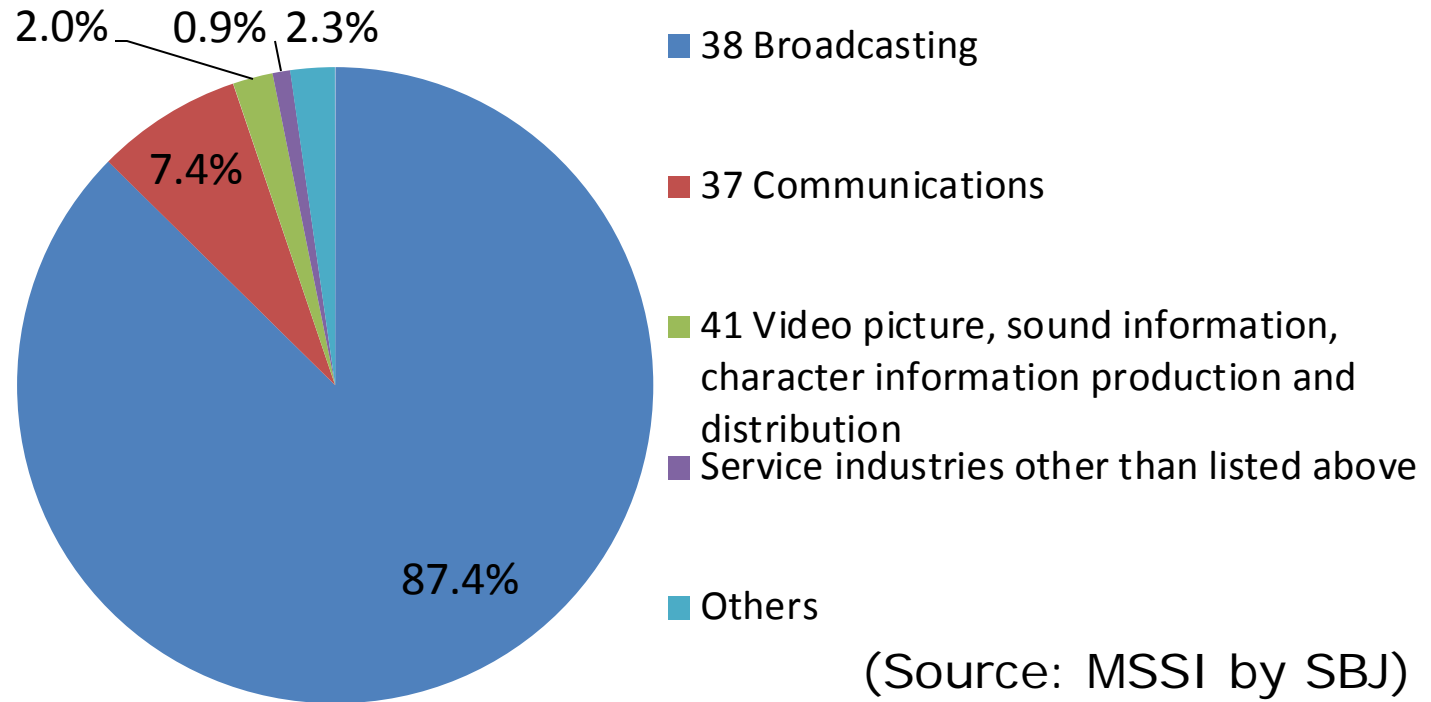
□ MSSI: Survey on enterprises



4. Market conditions and constraints (Cont.)

□ Turnover by business activity

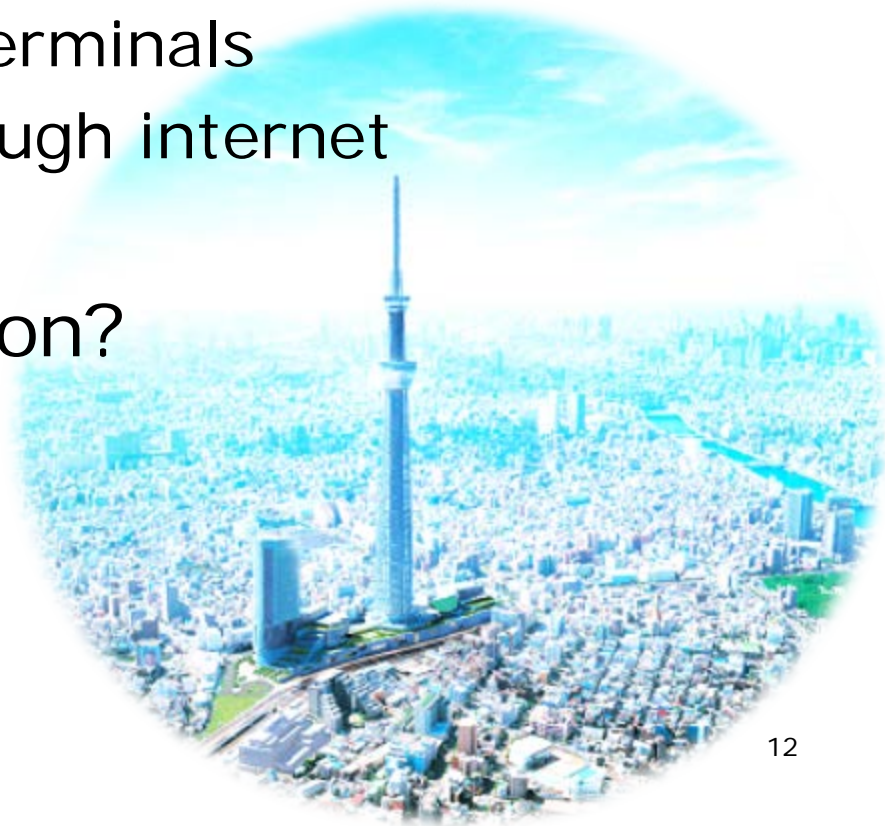
Composition ratio of turnover by business activity of enterprises and establishments whose principal industry is Broadcasting (January, 2013)



(Source: MSSSI by SBJ)

4. Market conditions and constraints (Cont.)

- Diversification of Broadcasting
 - Cablecasters function as internet providers
 - Receiving broadcast through internet
 - Broadcast for mobile terminals
 - Video-on-demand through internet
 - Smart televisions
- Revision of classification?
 - Maybe in the future.



5. Turnover data methods

- MSSSI (Monthly)
 - Sample survey
 - Questionnaires distributed & collected by mail (also available online)
 - Total turnover of entity, turnover of enterprise by business activity
 - Preliminary results: 2 months after survey
 - Final results: 5 months after survey
 - Missing values occur, estimated value used for tabulation
 - Also collect number of workers, type of legal organization, amount of capital and so on

5. Turnover data methods (Cont.)

□ 2012 ECBA

- Questionnaires distributed & collected by enumerators or by mail (also available online)
- Total annual turnover of entity, turnover of entity by business activity
- Preliminary tabulations released in January (1-digit level) and March (Manufacturing , 2-digit level), 2013
- Final tabulations released in August (3-digit level), November, 2013 and February, 2014
- Also collect financial items, and tabulate value added

6. Summary

- Turnover collected by business activity
 - By revision of MSSSI, we can grasp monthly turnover by business activity of entities whose principal activity is Broadcasting.
- ECBA
 - In 2012, turnover and other financial items of all entities of all industries were surveyed for the first time.
- Diversification of Broadcasting
 - Grasping figures by business activity will become more important.



Thank you for listening!

